



Small Businesses & Startups

A practical roadmap from getting set up to running clean, then help with whatever is slowing the business down.

What we deliver

- Business setup roadmap and checklists
- LLC, DBA, EIN and annual report filings
- Business tax receipt applications
- Bookkeeping systems, spreadsheets and reporting
- Invoicing and cash-flow tracking
- Website, domain and business email setup
- Vendor, software and process selection

What we hear

"I don't know what I'm supposed to file."

Entity, EIN, tax receipts and annual reports are easy to miss when nobody tells you they exist.

"My business and personal money are mixed."

Without separation, year-end turns into a sorting project and a bigger CPA bill.

"We don't look like a real company yet."

No business email, no website and no capabilities sheet cost credibility with customers.

How the work runs

- MONTH 1** Set-up roadmap: A written checklist of filings and systems, with owner decisions flagged.
- MONTH 1-2** Filings: Entity, EIN, DBA and business tax receipt filed as you direct.
- MONTH 2** Systems: Invoicing, bookkeeping and expense tracking in use.
- ONGOING** Run clean: Monthly reporting, renewals and deadlines handled.

Who we work with

New startups

Side businesses going full time

Family businesses

Service companies

Retail and food

E-commerce

Documents we keep in order

- Articles of organization
- EIN confirmation
- Operating agreement on file
- Business tax receipts
- Invoice templates
- Bookkeeping files

Capabilities engaged

Consulting & Strategy

Operations & Back Office

Records & Research

Business Filings

Document Services

Connections & Vetting

Technology Setup

Clear lines

We handle

Write the set-up roadmap
File the paperwork you direct
Build invoicing and bookkeeping systems
Set up email, domain and website

Licensed professional

Choosing the entity type (attorney or CPA)
Tax advice and returns (CPA)
Contracts and legal review (attorney)
Licensed trade work (licensed professional)